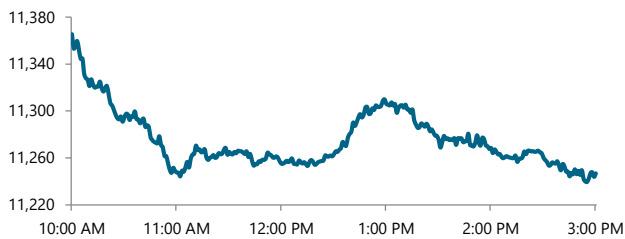


# Daily Markets Overview

14 November 2022

## TASI Intraday



Source: Reuters

## Saudi Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
Saudi (TASI)	11,247	0.3	0.3	-0.3	14.1
Saudi (NOMUC)	19,024	0.6	0.6	-26.8	1.3
Energy	5,793	0.6	0.6	5.0	6.4
Materials	6,379	-0.1	-0.1	-13.1	10.5
Capital Goods	5,915	-0.9	-0.9	-21.6	14.7
Com. & Prof. Svc	3,695	0.9	0.9	-16.8	31.7
Transportation	4,816	1.4	1.4	-8.0	NA
Cons. Durables & Apparel	4,708	0.3	0.3	-25.9	NA
Consumer Services	4,053	0.6	0.6	-12.7	NA
Media	22,529	-1.8	-1.8	-3.1	24.7
Retailing	7,643	0.2	0.2	-22.4	27.0
Food & Staples Retailing	9,621	0.3	0.3	5.5	8.5
Food & Beverages	4,904	0.0	0.0	1.4	40.4
Health Care Equipment	8,921	1.5	1.5	22.0	38.9
Pharma, Biotech & Life Science	3,174	-1.7	-1.7	-38.9	NA
Banks	12,900	0.5	0.5	5.6	16.4
Diversified Financials	6,858	-6.0	-6.0	0.4	19.3
Insurance	5,354	-0.5	-0.5	-10.6	NA
Telecommunication	6,721	0.0	0.0	-7.7	14.8
Utilities	7,419	1.5	1.5	25.0	19.3
REITs	4,078	0.1	0.1	-11.6	18.1
Real Estate	2,750	-0.2	-0.2	-13.3	NA

Sources: Bloomberg, Reuters, Tadawul

## Top 5 Gainers

Company	Last Close	% Change	Value (SAR mn)
Saudi Arabian Amiantit Co.	46.65	9.9%	20
Etihad Atheeb Telecommunication Co.	62.30	9.9%	79
Dallah Healthcare Holding Co.	172.00	7.6%	27
Arabian Pipes Co.	40.60	7.4%	23
Naseej International Trading Co.	48.10	5.3%	33

Source: Tadawul

## Upcoming General Assembly Meetings

Company	Date
Scientific & Medical Equipment House Co.	15-Nov-22
Tourism Enterprise Co.	20-Nov-22
Arabia Insurance Cooperative Co.	20-Nov-22
Lazurde Co. for Jewelry	22-Nov-22
Middle East Paper Co.	24-Nov-22
Sahara International Petrochemical Co.	30-Nov-22

Source: Tadawul

## Saudi Market Update

- TASI closed 0.3% higher at 11,247, while NOMUC gained 0.6% to 19,024 on Sunday. TASI traded value totaled SAR 6.7bn and averaged SAR 5.5bn over the last 30 days. The five most active stocks (by value) in TASI accounted for 57.8% of the daily traded value.
- MSCI Emerging Markets was closed for trading on Sunday.
- Banks increased 0.5%, while Materials declined 0.1%. Telecom ended flat. Health Care Equipment and Utilities (up 1.5%) were the best performing sectors. Among stocks, Saudi Arabian Amiantit Co. (2160/SAAC AB), Etihad Atheeb Telecommunication Co. (7040/EAT AB), and Dallah Healthcare Holding Co. (4004/DALLAH AB), led the gainers.
- The Ministry of Municipal and Rural Affairs and Housing signed an agreement worth SAR 2.3bn (USD 611.62mn) with National Housing Co. (NHC) to implement 6,300 housing units in Makkah. (Source: Argaam)
- The Public Investment Fund (PIF)'s Governor indicated that the fund aims to manufacture 328,000 electric vehicles (EVs) annually. He added that this comes through the fund's investments in EV companies, CEER and Lucid. (Source: Argaam)
- The Public Investment Fund (PIF)'s Head of MENA Investment Advisory revealed that the sale of 12mn shares in Saudi Tadawul Group Holding Co. (1111/TADAWULG AB) comes in line with the fund's strategy to recycle its capital. He added that the program aims to invest in emerging and promising sectors in the local economy. (Source: Argaam)
- Middle East Healthcare (4009/MEH AB) revealed that it has completed the construction of the medical tower and inpatient bed expansion project in Saudi German Health Riyadh, including the installation of medical and other equipment. The company added that it will announce the date of actual operation and the financial impact on the company after getting the final approval from the Ministry of Health. (Source: Argaam)

## Top 5 Losers

Company	Last Close	% Change	Value (SAR mn)
Saudi Tadawul Group Holding Co.	188.80	-9.9%	2,664
Fitaihi Holding Group	32.20	-6.9%	21
Tourism Enterprise Co.	169.00	-5.4%	29
Saudi Enaya Cooperative Insurance Co.	16.80	-4.0%	9
Development Works For Food	197.20	-3.6%	17

## Most Active Stocks by Value (SAR mn)

Company	Last Close	% Change	Value (SAR mn)
Saudi Tadawul Group Holding Co.	188.80	-9.9%	2,664
Arabian Drilling Co.	128.00	1.3%	377
Al Rajhi Bank	84.00	-0.1%	375
The Saudi National Bank	56.50	2.9%	229
Saudi Arabian Mining Co.	70.20	-1.7%	222

Source: Tadawul

**NOTES:** (1) Prices as of last trade. Updated as of November 13, 2022  
(2) WTD: Week to Date and YTD: Year to Date

# Daily Markets Overview

14 November 2022

## GCC Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
Dubai (DFM)	3,407	0.7	1.7	6.6	9.3
Abu Dhabi (ADX)	10,630	0.1	1.4	25.2	19.0
Kuwait (KSE)	6,984	0.8	0.8	-1.3	17.8
Qatar (QE)	12,610	0.4	0.4	8.5	14.1
Oman (MSM)	4,472	1.0	1.0	8.3	12.5
Bahrain (BSE)	1,868	0.1	0.1	3.9	5.4
DJMENA Index	740	0.4	0.4	-0.9	NA

Source: Bloomberg, Reuters

## Global Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
US (S&P 500)	3,993	0.9	5.9	-16.2	19.3
US (NASDAQ 100)	11,323	1.9	8.1	-27.6	21.4
UK (FTSE 100)	7,318	-0.8	-0.2	-0.9	13.4
Germany (DAX)	14,225	0.6	5.7	-10.5	13.5
France (CAC 40)	6,595	0.6	2.8	-7.8	13.7
Russia (MICEX)	2,217	0.3	2.9	-41.5	3.8
Japan (Nikkei)	28,264	3.0	3.9	-1.8	18.9
Hong Kong (HSI)	17,326	7.7	7.2	-26.0	6.6
South Korea (KOSPI)	2,483	3.4	5.7	-16.6	11.7
China (SHCOMP)	3,087	1.7	0.5	-15.2	13.8
India (NIFTY)	18,350	1.8	1.3	5.7	22.8
Brazil (IBOV)	112,253	2.3	-5.0	7.1	6.2
Turkey (BIST 100)	4,456	-0.3	5.7	139.8	5.6
Egypt (EGX30)	11,757	0.0	4.4	-1.6	7.6
MSCI Emerging Markets	936	5.2	5.7	-24.0	10.6
MSCI World	2,674	1.4	6.7	-17.3	17.1

Source: Bloomberg, Reuters

## Commodities Prices

Index	Last Close	1 Day %	WTD %	YTD %	1 Year %
Brent Crude (\$/bbl)	96.0	2.5	-2.6	23.4	15.8
Natural Gas (\$/mmbtu)	5.9	-5.8	-8.1	57.6	35.5
Gold (\$/oz)	1,771	0.9	5.3	-3.2	-4.9
Silver (\$/oz)	21.7	0.1	4.1	-6.9	-14.1
Platinum (\$/oz)	1,033	-0.3	7.1	6.6	-5.1
Copper (\$/t)	8,502	2.6	4.5	-12.7	-13.3
Zinc (\$/t)	3,044	5.0	5.2	-15.2	-7.6
Lead (\$/mt)	2,157	4.4	6.7	-7.4	-9.6
Wheat (\$/bu)	835	1.2	-1.5	8.4	2.2
Corn (\$/bu)	663	0.5	-2.6	11.8	19.9
Sugar (\$/lb)	19.6	1.2	5.0	4.0	3.4

Source: Bloomberg

## Interest Rate Watch (3M Interbank Offer Rate, %)

Country	Last Close	1 Day Change	YTD Change	Spread*
US	4.61	-0.04	4.40	0.00
Saudi Arabia	5.63	-0.19	4.72	1.02
UAE	4.36	0.11	3.99	-0.25
Kuwait	3.94	0.00	2.44	-0.67
Qatar	4.83	0.13	3.70	0.22
Bahrain	5.73	0.00	4.22	1.13

Source: Reuters

### NOTES:

(1) Prices updated as of November 11, 2022 (2) WTD: Week to Date; YTD: Year to Date; NA: Not Applicable, \*Spread = US 3M Rate – Country 3M Rate

## GCC & Global Markets Update

- Global markets were closed for trading on Sunday.
- Asian markets are trading mostly higher on Monday. China is up 0.8%, while Japan is down 0.7%. South Korea, Hong Kong and India are trading 0.2%, 2.9% and 0.1% higher, respectively, in the morning session.
- The UAE market was closed for trading on Sunday. GCC markets (excluding the UAE market) ended in the green on Sunday. Kuwait and Qatar increased 0.8% and 0.4%, respectively. Oman and Bahrain gained 1.0% and 0.1%, respectively.
- According to the World Bank, domestic economic growth in Kuwait this year is expected to accelerate to 8.5%, and that the balance of public finances record a 1.1% surplus of total output. It added that domestic non-oil sector is forecasted to grow 7.7% this year and it expected a rise in oil revenues to compensate for a large import bill resulting in a large surplus in external balance by 26.8% of GDP in 2022. (Source: Zawya)
- According to the Department of Municipalities and Transport (DMT), Abu Dhabi's real estate market witnessed continued growth in 3Q22, recording a total of 4,441 transactions amounting to over AED 21.04bn (SAR 21.54bn). The emirate recorded 1,995 real estate sales worth AED 5.39bn (SAR 5.52bn), and 2,446 mortgage transactions worth AED 15.64bn (SAR 16.01bn). (Source: Zawya)
- According to reports, the Federal Tax Authority confirmed its intention to launch the EmaraTax platform on December 5. The migration to EmaraTax will commence from the end of day on November 30 and EmaraTax will be available for use from December 5. EmaraTax significantly enhances taxpayer access to the FTA's services, payment of taxes and obtaining refunds. (Source: Trade Arabia)

## Coming Up

- China industrial production for October (prior: +6.3% Y/Y; consensus: +5.2% Y/Y) will be announced tomorrow. (Source: Trading Economics)
- China unemployment rate for October (prior: 5.5%) will be announced tomorrow. (Source: Trading Economics)
- Japan industrial production for September (prior: +3.4% M/M, +5.8% Y/Y; consensus: -1.6% M/M) will be announced tomorrow. (Source: Trading Economics)



# Daily Markets Overview

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### Saudi Fransi Capital (Closed Joint Stock Company Owned by Banque Saudi Fransi)

Authorized and regulated under Capital Market Authority license 11153-37. The company is operating under commercial registration 1010231217 with a paid up capital of SAR 500,000,000.

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